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ABSTRACT

This publication provides an overview of long-range planning and then provides a partially-programmed text to help school administrators conduct long-range planning for staff development. Section 1 presents a rationale for long-range planning, defines it, and provides an overview of the issues affecting it. This section discusses selecting the participants in long-range planning and the development of the process. Also included are points to be considered in designing the long-range planning process and a brief planning model. Section 2 is an outline for a multiyear staff development planning document. It explains each step in creating the document, from the title page to evaluation of the plan, and provides workspace in which to do so. This section includes information on doing a needs assessment, preparing a mission statement, writing goal statements, doing a discrepancy analysis, writing objectives, deriving criteria to signify attainment, and writing and figuring the cost of activities. (Author/JM)

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Long Range Educational Planning With Emphasis on Staff Development

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EA 012 596

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LONG RANGE PLANNING
WITH EMPHASIS ON STAFF
DEVELOPMENT

HELLO!

THE TASK YOU ARE ABOUT TO BEGIN MAY APPEAR TEDIOUS TO THOSE OF YOU WHO HAVE A GOOD BACKGROUND IN THE SO-CALLED SYSTEMS APPROACH. HOWEVER, WE NEED MATERIAL THAT IS IN A STANDARD FORMAT, SO WE ARE ASKING YOU TO FOLLOW THE INSTRUCTIONS STEP BY STEP.

A WORD OF WARNING: THIS TASK MAY TAKE SEVERAL MONTHS OR IT CAN BE COMPLETED BY ONE PERSON IN ABOUT THREE (3) DAYS. HOWEVER, PLEASE REMEMBER THAT YOU ARE PLANNING FOR A FIVE-YEAR PERIOD. THUS, THE TIME YOU SPEND IS SHORT FOR SUCH AN IMPORTANT PROJECT. THANK YOU AND GOOD LUCK!!

INTRODUCTION TO LONG RANGE PLANNING

WITH EMPHASIS ON STAFF DEVELOPMENT

The material you are about to read is presented in two major sections. Section I is an overview of the issues in long range planning (L.R.P.), the participants in and development of the L.R.P. process and a brief discussion of a planning model. Section II is a partially programmed text to help you zero in on staff development and L.R.P.

SECTION I

Some Issues Relating to L.R.P.

Those that control and those that administer American Schools are frequently asked:

(A) Are we using our human and material resources in the most cost effective manner?

(B) Can't we plan in such a manner that we know we are using our resources wisely and that we are obtaining maximum return for the dollar spent? Thus, an important administrative function, planning, is sought as a path to answers to the question on cost-effectiveness. However, the solution, better educational planning, is full of issues that should be considered before a board and administration begins a commitment to educational planning. Some of the issues are:

a. Do we commit our educational team to educational planning, or do we continue to operate as we have in the past?

b. Educational planning has so many definitions and interpretations that it is difficult to understand.

c. Prediction is an inexact science - so why try to predict futures?

d. Are we aware of the role that politics plays in our planning process?

e. Does changing educational leadership and board control affect educational planning?

Issue A relates to a commitment on the part of the board members and the administration to understanding and developing the planning process. It should be recognized that some individuals, usually called anti-planners, simply do not believe that educational planning is a reality. These persons are convinced that there are so many future variables that cannot be anticipated that systematic approaches to goal attainment are futile. Fortunately there are few anti-planners but even one, in a responsible position, can sabatoge a plan. Thus there must be a commitment to the proposed outcomes of planning by all concerned if the process is to be successful. In-service training for board members and administrators is often a wise step to reaching conclusions about adopting a process for educational planning.

The second issue relates to communications in educational planning. There are many definitions, and unless all team members are reacting to the same understandings, educational planning is likely to fail. It isn't necessary to be original and develop localized definitions, for there are many definitions that may be used. For example, educational planning may be considered as "the systematic approach to goal and objective setting and achievement that results in obtaining the most education for the dollar spent." However, even a definition like this is open to many interpretations. It may be necessary to go further with definitions. For example,

since planning is time related, time periods can be used to assist in the development of definitions. Typical definitions might be:

> Category I Planning = Operational planning (0-1 year). It is the kind of planning we all do and is definitely related to the functions of administration. We do operational planning in the areas of finance, curriculum, student personnel, faculty-staff, facilities and community relations.
>
> Category II Planning = Long range planning (1-5 years). Few of us do systematic long range planning that encompasses the six functions listed in category I (above).
>
> Category III Planning = Futures (5 years or longer). Futures are fun and constitute an interesting and important game, but unless we are Jeanne Dixon's relatives we have little luck with futures.

After examining these definitions it becomes evident that the type of planning that most of us will commit human resources to accomplish is long range planning. However, it should be noted that although it is not important whether a board or administration accepts the definitions given here, it is imperative that a set of definitions be developed, fully communicated and understood by all of those persons affected.

The third issue related to predictions and the validity of predictions. Long range planning deals with the immediate and intermediate future. Thus, planners must predict immediate future occurances, and the task is very difficult. Prediction that is in the immediate future is easier than prediction in the far future. It is moderately easy to predict local school enrollments for the forthcoming school year, but it gets more difficult

to remain accurate with each additional year of prediction. However, there are methods that can be used to predict future occurrences and these methods, although only a little better than chance, should be used. Prediction is often based on historical data, and those active in planning who try to improve their predictions often depend on the development of a good historical data base. Most school systems have decent data in the areas of finance, curriculum, faculty-staff, facilities and students. It is often necessary to develop a data base representing the community.

Another issue that must be met before embarking on a planning process is to acknowledge that social and party politics will probably affect the planning process. Education is no stranger to social or party politics. Board members' and administrators' live and work in a social-political arena and are influenced through the opinions and attitudes of their friends and neighbors. The board and administrators of American schools overseas are very much aware of the federal party politics of the host country and recognize the necessity to consider these politics in any L.R.P. Education is political in nature, and planners must learn to use social and party politics to aid them in the planning process.

Another issue related to educational planning is the effect of administrative leadership on the development of the planning process. Boards of education employ executive officers with the anticipation that they will lead. Leadership relates directly to the future and thus to educational planning. It is often true that the personality and leadership style of the superintendent may be identified in the planning process adopted. With educational leadership changing through attrition and upward mobility of superintendents, the process adopted for educational planning may also be subject to change.

Educational planning is not an easy task. It is complicated by the issues discussed. Educational planning in any American school will be successful if the developers of the planning process have evolved an understanding of the issues presented above - to ignore the issues means almost sure defeat of the planning process.

Selecting the Participants and Developing the Process

One of the great aspects of most of the American schools overseas is the concept of local control. The idea that individual schools have the right to be unique is basic to quality systems of education. Some would argue that additional host national laws are eroding local control. It is not the point of the authors to develop pro or con arguments about local control. Instead the authors hold that educational planning processes can be developed at the local level and can be directed toward the unique needs of the district. By taking the position that American schools overseas can develop long range planning processes to meet their needs it follows that those responsible for the educational system must be concerned with the participants and the planning process. Although in actual practice the development of the identification of participants and the development of the process may seem to be concurrent activities, there is some logic to the consideration of the participants first.

In most American schools that wish to engage in long range planning there are two distinct groups of people that may be considered as participants.

(1) Persons formally related to the organization.

For example: A. Board Members

B. Administrators

C. Faculty-staff Members

(2) Persons having an interest in the district but no formal administration or control relationship.

A. Parents

B. Students

The decision to involve persons other than board members and administrators is not easy. The members of the board cannot delegate their authority, responsibility and accountability derived from law or charter. Thus, the inclusion of persons in a planning process where decisions are to be made that will affect the future of the organization may be good or bad.

Certainly individual participation in any process tends to improve communications and enhances the chance of success of the project. On the other hand, individuals outside the formal organization have no responsibility for decisions made or actions taken. In addition, mobility of board members and staff is so great in some American schools that participants may leave before the plans are implemented. Thus, the board and administration must carefully consider the pros and cons of participation.

After a decision is made about who the participants will be, further decisions must be made concerning the level of participation. For example, will parents be included at the central office level of planning? Will students and parents be included at the building level? Questions such as these need to be answered and formalized before the next major decision is made.

When the process is completed and the participants identified, another major step is necessary. The training of the participants is an imperative. Although professionals may have more formal training in planning than non-professionals, all of the participants need to be educated as to the plan-

ning process to be followed and particularly their roles in the process. At this time it should be made clear that the non-professional participants will complete the project by a specified time and will not continue to contribute to the long range planning process in the future. Even though long range planning is a continuous process continuing with the same group of non-professionals for long periods of time may be detrimental. Participants over long periods of time tend to usurp the board's powers. In addition, new participants enhance the opportunity for fresh ideas and contributions.

It is also necessary to make sure that non-professionals and some professionals understand that they are advisors and not decision makers. Decision making should remain with those who have authority and are responsible for the decisions made. The advisory function is very important but must remain that - an advisory function.

Points to be considered in developing the long range planning process

Observations of the work done in several American schools overseas is the basis for the following suggestions about developing the L.R.P. process:

Suggestion number one is that Complex organizations must have a plan for planning. This suggestion is not an example of redundancy. American school systems are complex. They must serve a number of publics. They must adhere to host nation guidelines, obligations, and laws. They deal with the most unique product of society - the child. The different publics served, the legal constraints to be met and the unique school user, the overseas student, require relatively complex organizations. Thus, these complex organizations need a careful plan to implement long range planning. The plan for planning should be developed in writing and communicated to

the various publics. It should be a rather detailed plan that lists specific steps and assigns responsibilities of participants.

Another suggestion relates to the need to develop a long range planning process that fits the organizational plan of the American school. Although most American schools tend to be mixtures of centralized and decentralized structures, it is also true that they tend to be either more centralized or more decentralized and these emphases can mean a difference in the planning process. For example, a school that tends toward a decentralized organizational pattern may wish to place specific responsibility for planning at the principal's level. In a school that leans toward centralization, the responsibility for following plans would be at the principal's level; but the development of plans would remain the responsibility of the central office. When developing the planning process, special consideration should be given to the centers of authority, responsibility and accountability in the line sectors of the administrative structure.

A third suggestion relates to the mission of the school and the planning process. The prime focus of the planning process should stem from the mission of the school. Sounds simple - all of us know the mission of an American schools overseas. Yet persons within these complex organizations often become so involved in striving for the mission that the mission becomes secondary, and the activities become more important. In a management sense all professional activities that occur in an American school can be listed under six categorical headings. They are Program (curriculum), Finance, Students, Faculty-staff, Facilities and Community Relations. The planning process should be designed to support the mission of the district by developing a process that acknowledges program (curriculum) as the heart of the mission and finance, facilities, students, faculty and staff and community as supports or users of program.

Another suggestion relates to logic. The planning process should be logical. Mr. Spock in Star Trek represents a fictional character whose very nature is based on logic. Many of us are not as logical as Mr. Spock, but we recognize that a logical argument or position very often wins the argument. Thus, the developers of the planning process should remember a logical planning process has more chance of success than an emotional process.

A final suggestion about developing the planning process is directly related to participants. It is suggested that in the developmental stages an effective long range planning process must be separated from district operations. Yet the product of the planning process, the long range plan, must be practical enough to be operationalized. In practically every instance where the authors have talked to administrators who have developed planning processes they say something like this: "We couldn't have completed plans for the district if X had not been released from his/her regular duties one-half time." Day-to-day and month-to-month operations of the district require on-the-scene decision making and effective operational planning. Most administrators are so busy with operations that long range planning is nothing more than a guilty feeling. Someone should be released from his/her regular duties to be responsible for developing the planning outcomes. A specific commitment of human resources is needed if the long range planning process is to be successful.

When the participants have been selected and the planning process considered, a part of the training should include the examinations of models of long range planning used in other districts.

LONG RANGE PLANNING - A MODEL

After you have developed your plan for planning there is no need to re-invent the planning process. Even though each American school will have a unique planning system which reflects the educational leadership, there is a planning structure that can be used and/or modified. This structure or model meets most of the requirements discussed in the previous sections.

We are all familiar with models. Our children play with model planes, tanks, cars, trucks, etc. They may be carefully scaled copies of the real thing, but they are models and cannot perform the functions of the real item. It is also true that the model presented here won't "fly". The plan for planning doesn't exist, and participants have not been identified and trained. However, a process is presented, one that can be modified to meet the unique needs of an American school. The model is a mixture of outcomes and activities. The "outcomes" are representative of an accomplishment, and the "activities" represent the participants' active work to reach a conclusion or complete an event.

A planning model has the following steps, or outcomes:

(A) Needs Assessment

(B) The Mission Statement

(C) The Goal Statements

(D) Discrepancy Analysis

(E) The Objectives

(F) Determining how you will know when you have achieved the Objective

(G) Describing the Activities

(H) Costing the Activities

(I) Evaluating the Plan

Before examining the model in detail it would be wise to define some of the important words used in the model. The words and a definition are:

Needs Assessment - The process of deciding the current status (health) of the American school - such factors as curriculum facilities, finance, students, staff-faculty, community.

Mission Statement - A statement of an institution or organizations enduring purpose or aspiration. Serves to describe the most general focus or direction.(1)

Goal - Broad qualitative statements derived from mission.

Discrepancy Analysis - The difference between where the school is and where you, as a planner, want to go. (Curriculum, finance, students, staff-faculty, community, facilities).

Objective - Specific, quantitative measurable statements.

Attainment Criteria - Statements that describe the conditions that prove the objective was reached.

Activities - Those actions that consume human resource time and materials.

Costs - The aggregate of the monies spent for the human resource time and materials consumed.

Evaluation - Have we met objectives.

Use these definitions to help you understand the steps of the model. The model is presented by using three columns. Column one includes a list of possible participants. Column two includes a brief description of the

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(1)National Center for Higher Education Management Systems, Outcomes Workshop Printed Material.

activities in which the participant may be engaged, while column three is a description of the outcomes that might be expected from a group of participants engaged in certain activities.

THE STEPS OF LONG RANGE PLANNING

	PARTICIPANTS	ACTIVITIES	OUTCOMES
Step I	(1) Administrator (2) Research specialists	Questionnaires, hearings, any activity designed to elicit information on current status of the educational program	An analysis, in writing, of the educational needs of the American school (finance, facilities, faculty-staff program, students community - A needs assessment)
Step II	(1) Board Members (2) Administrators (3) Teachers (4) Citizens (5) Students (6) Any mixture of above	Research, discussion, write	A mission statement for the American school
Step III (a)	(1) Board Members (2) Administrators (3) Teachers (4) Students (5) Parents (6) Any mixture of above	Discussion, Phi Delta Kappa Goals Game; Districts Goals Game, Writing	In writing, goals of the American school derived from the mission statement
(b)	(1) Administrators (2) Research Specialists or 1-6 in (a) above	Discussion, voting, arguments and some form of group decision making	Goals of the American school in priority order and in publishable form.
Step IV	(1) Administrators (2) Research Specialists	Questionnaires, hearings any activity designed to elicit information on where the district is in relationship to its goals	A descrepancy analysis in writing, the current status of the American school (finance, facilities, faculty-staff program, students, community).
Step V	(1) Administrators (2) Teachers (3) Students (4) Parents (5) Any mixture of above	Discussion, voting, many arguments - some form of group discussion.	Written objectives for the American school or for a level (K-6 or 7-12) derived from the goals.

Step VI	Writers of Objectives	Analysis of Objective	In writing, a statement that will reflect the attainment of the objective
Step VII	(1) Administrators (2) Teachers (3) Students (4) People with special knowledge (5) Mixture of above	Conferences, discussion, contacting possible consultants	In writing, a list of activities that consume time (human resources) and material resources
Step VIII	Writers of the Activities	Cost Analysis of Activity	Cost of (A) Human Resources (B) Material Resources for each activity.
Step IX	Participants in appropriate level	Evaluation - How well have we done in relation to what we said we would do (see step VI)	A written summary of success or failure and report to Board of Control
Step X	Recycle in 4 years		

In narrative form the planning cycle is as follows:

Needs assessment - Many planners believe that the needs assessment is the first step in any planning process. Others believe that after the mission statement and goals have been written, a needs assessment should occur. The authors believe that a good starting point is the needs assessment. In addition, we believe that it is necessary to take a critical look at the status of the american school after the philosophical directions have been set. We explain this further under the section entitled discrepancy analysis.

The mission statement is next, and it may be very short (a few sentences) or relatively long. Some mission statements include a brief history of the district followed by a statement of demographic data and concluded by a statement of mission of the school. Again the mission statement should reflect the unique direction of the school. A warning, the longer the statements become the more likely it is that the mission statement will contain goals. Thus, the writing of the goals will be redundant.

After the mission statement it is necessary to write the goals. The goals should be derived from the mission statement and are still rather general. They often have some qualitative content. It is easier to write goals than it is to put the goals in some priority order. Yet the next step is to make sure that the goals are written with top priority given to the most important goal, arranging all the other goals in the order of their importance. Very often the Phi Delta Kappa procedure is used to aid participants in reaching the goal priority.

The discrepancy analysis should be brought into the planning cycle. This is the sequence position that is favored by many planners. The mission has been developed, the goals written and prioritized; and it is now time to assess where the district is in relationship to where it should be going.

The next step is the writing of objectives. The objectives are derived from the goals, and there may be more than one objective derived from a goal. It is important that the objectives be written in terms that can be measured by some appropriate procedure or instrument.

The next logical step is to write the attainment criteria for each objective. When the attainment criteria are completed, it is necessary to return to the objectives to provide the important data relating to costs that are needed for decision making. The costing of plans is often the weakest part of a plan. Yet there is a procedure that can be used to develop relatively accurate cost figures. In order to accomplish the costing task it is necessary to list the activities that are necessary to attain the objective. Remember that an activity consumes human resources, in the form of time and materials. Thus, if you can describe the activity in terms of time consumed and participants engaged in the activity, you will be able

to develop a fairly accurate cost picture for the activity. In addition, whenever an activity requires material resources, these costs should be added to the time-costs estimates. The last step in the process is the evaluation of the plan. Obviously this step takes place at a later time when it is possible to assess how well the goals and objectives of the plan have been met.

Planning is time related. It is suggested that long range planning be developed for five-year cycles and that the mission be reassessed every twenty years or as needed. Thus, an American school would accomplish four five-year planning cycles before re-examining the mission. Each cycle would overlap one year for planning development.

You are now about to begin the task of planning a five-year staff development program. Note that we have chosen to emphasize staff development and wish to plan specifically for staff development. The L.R.P. system described previously will work with any of the six management functions catagories (finance, students, faculty-staff, facilities, curriculum and community) and it is easy to apply the process to a specific function such as staff development.

A.

For our purposes staff development is defined as "any planned activity that contributes in a positive fashion to the career patterns of the staff in the American school." Staff development is the major aspect of the administrative function designated as faculty-staff category in planning. What staff development is and is not is well stated by Claxton when he says:(1)

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(1)Charles S. Claxton, Community College Staff Development, Soorther Regional Education Board, Atlanta, Georgia, 1976, p. 22.

1. Staff development is not "for someone else." Rather, it is for everyone on the staff--faculty, administrators, student services staff, support staff, custodial personnel, secretarial staff and security officers.

2. Staff development is not something isolated from the other activities of the organization. It is a continuous, interactive process that encompasses the entire institution and all its people.

3. Staff development is not a pre-packaged program brought in from the outside and imposed on the institution. Rather, the staff looks at what is needed for this particular community college and the design of the program flows from that analysis.

4. A staff development program is not a haphazard use of resources. It is a planned resource allocation which is consistent with the goals of the institution.

5. Staff development is not a "bag of tricks." Instead, it is a context for selecting ways to achieve individual and institutional goals and a means by which they can be achieved.

We are emphasizing teacher development. In the last analysis, one of the crucial interactions in teaching-learning is that which takes place between the teacher and child. If, through staff development activities, we can improve the teachers affective and cognative approach to the teaching-learning interaction, then we will be contributing to the most important aspect of education-the intellectual and emotional growth of the child.

Staff development is important and long range planning for staff development will be valuable.

Let's start on the plan. Please turn to page 20.

OUTLINE FOR MULTI-YEAR STAFF

DEVELOPMENT PLANNING DOCUMENT

Please turn to page 21.

INSTRUCTIONS

The multi-year (two- to five-year) staff development plan you are about to construct with the aid of this booklet consists of several steps. They are:

I. The Title Page

II. The Needs Assessment

III. The Mission Statement

IV. The Goals Statements

A. Writing the Goals

B. Prioritizing the Goals

V. The Discrepancy Analysis

VI. The Objectives

VII. The Attainment Criteria

VIII. The Identification of Activities

IX. The Cost Estimate

X. The Evaluation of the Plan

In this booklet we will consider a way to develop these elements one at a time. Once you have become familiar with the elements, you may find that an alternative method of development works better for you. Nevertheless, place your final product in the form outlined in this booklet.

Do not treat the pages of this preparation document as sacred. First, read through the booklet critically to make certain you understand how the final set of elements is to appear in completed form. Then, as you work your way through the booklet, do not hesitate to cut and paste prior sections in order to develop subsequent sections. There is no need for redundancy.

Remember that the staff development plan you construct with the help of this booklet will have continuing value to you. As you carry out the plan you devise, you will very likely wish to revise it from time to time as conditions and circumstances change. This plan can serve as an excellent basis for staff development. Additionally, the objectives development process used in this document can serve as an excellent vehicle to write objectives for any subject-matter area you wish.

Now turn to page 23 and begin by completing your title page.

TITLE PAGE

The first element, the TITLE PAGE, is more than a cover--it contains information useful to the reader, such as:

1. The Title
2. The Time Period Covered
3. For Whom It Was Prepared
4. By Whom It Was Prepared
5. When It Was Prepared
6. When Approved By Board of Control (Education)

In the interest of uniformity, the TITLE PAGE should look like the following . . . . . (Turn to page 23A).

INTERNATIONAL SCHOOL

Five-Year Plan for
Staff Development
1979-80 through 1983-84

Prepared by Dan Preston, Director

Prepared for the Board of Education of the International School
and the Department of State,
Office of Overseas Schools

Consultants--Richard Featherstone and Howard Hickey

Approved by Board of Control (Education) (date) September 1, 1978

(Use this page as an example -- Now turn to page 23B and complete your title page.)

(23A)

NOW --- Prepare a draft of your TITLE PAGE

Does your TITLE PAGE look like the one on page 23A? If so, let's continue...
Turn to page 24 and begin to work on your NEEDS ASSESSMENT.

(23B)

NEEDS ASSESSMENT - You may choose to assume the responsibility for the NEEDS ASSESSMENT by using your administrative judgement. However, if you do wish to accomplish a comprehensive NEEDS ASSESSMENT, that produces hard data, it will be necessary for you to purchase or develop questionnaires, tests, etc., to help you ascertain the current status of the American School as it relates your perception of the purpose of the school.

Finished your NEEDS ASSESSMENT? Then turn to page 25 and begin work on your MISSION STATEMENT.

Preparing THE MISSION STATEMENT

A MISSION STATEMENT is a "blue sky" dream about what you, your board, your staff, and your students think about the role of your school in the culture in which you live. It is dream-like. It may reflect ideas about what you wish to accomplish, to achieve, to become. You will find that the MISSION STATEMENT is the least definitive element in the multi-year staff planning document. It will not be specifically time related, will not have quantifiers, will not include evaluative statements. Yet, it may include statements that reflect quality, that set some quantitative standards, that provide the basis for evaluation.

The development of a MISSION STATEMENT provides you as director of the school with an excellent opportunity to involve as many interested parties as you wish in careful thought about the educational direction of your school. You may wish to develop the MISSION STATEMENT yourself. On the other hand, you may wish to convene a committee consisting of board of control members, staff, parents, and students. A MISSION STATEMENT prepared by such a committee would appear to carry with it a strong base of support in future school endeavors. Remember, a mission statement is: A statement of an institution's or organization's enduring purpose or aspirations. It serves to describe the most general focus or direction.(1)

THE MISSION STATEMENT may be very short or relatively long. Look at the sample on 25 and 25A.

A short MISSION STATEMENT may be similar to this:

> To meet the educational needs of the American children whose parents serve overseas. In addition, to provide

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(1)National Center for Higher Education Management Systems - Outcomes Workshop Material - Xerox - Boulder, Colorado.

a working model of the U.S. comprehensive school system for host countries.

A longer MISSION STATEMENT may look like this:

The Escuela Americana was founded in 1920 by the Real del Monte mining company, to service the children of their employees stationed in the city of Pachuca. Despite the withdrawal of most of the American community in the decade of the sixties, the school has continued to function successfully due to its reputation for excellance, and the desire on the part of a substancial segment of the population in Pachuca to offer their children a bilingual, American type education. Presently our school offers a program, incorporating methods from both the Mexican and American pedigogical systems. Because of the mixed nationality of our staff, its varied backgrounds and the level of professional preparation, we provide the finest educational experience in the city of Pachuca. Our students and community, whose daily lives are intricately interwoven with those of the American teachers and administrator at our school, enjoy a special opportunity to expand their horizons and overcome those prejudices, so contrary to democratic philosophy.

It is our intent to blend the finest of those Mexican and American educational practices and technologies to forge an atmosphere that is conducive to human understanding, individual development, and creative growth; and one that will provide our students and community with an experience that demonstrates the richness and productivity of international cooperation.

We believe that education is a transforming process that provides for growth in the intellectual, emotional and physical spheres of the human experience, and expect that the environment at our school will nourish and balance that growth, so that our students be intellectually prepared for the technological society they will undoubtedly inherit; be aware of their responsibility to their own physical well being, and be fit, emotionally to cope with the "slings and arrows of outrageous fortune".

We are convinced, that an educational program born of such philosophy will provide our students with a compass that will assist them to steer a course towards a productive, purposeful and rewarding life, in a world whose future will depend on their ability to assist their fellow-man overcome the hypnotically destructive forces of national rivalry.

Now begin your work on your MISSION STATEMENT. Please turn to page 25B.

MISSION STATEMENT FORMS

Remember -- answer questions like:

1. Why are we here (the School)?
2. What is our role in this culture?
3. What are we like now?

THE MISSION OF _____ SCHOOL

After you have prepared your MISSION STATEMENT, please turn to page 26E.

(25C)

Writing the GOAL STATEMENTS

GOALS are derived from the Mission Statement. They are more concrete or specific statements of the dreams or ideas you wrote in your Mission Statement. In this case, we are asking you to write GOALS to be attained over a period of several years. GOAL STATEMENTS are still difficult to measure, and seldom have quantifiers. GOAL STATEMENTS often use words such as improve, develop, understand, etc. Like the Mission Statements, GOAL STATEMENTS can profitably be collected from all groups interested in the educational directions of the school.

Do not be conscious of the order in which you write your GOAL STATEMENTS. First, get them written on paper as they come to your mind. Later, you can use this sheet to cut and paste when you consider the priority of your GOAL STATEMENTS in the next step, (page 27).

Here are some typical GOAL STATEMENTS:

> To offer the students the very best possible education by providing them with teachers who are knowledgeable about the most recent methodology and subject matter.
>
> To establish and maintain such standards of education as to be accredited by international and national accrediting bodies.
>
> To offer language instruction to the extent that all students may communicate effectively in both written and oral English.
>
> To promote responsibility and self-direction within the faculty through participation in the administrative process.
>
> To promote intercultural understanding and appreciation among both the faculty and the students.

Now that you know what a GOAL STATEMENT looks like, turn to page 26A.

GOALS

Describe below the goals of your staff development program. These should be philosophical statements of the long-range, ultimate aims of the program, which you believe can be achieved during the time period of your staff development plan.

When you have completed your statements, check page 26.

Do your statements look like those on page 26. If so, turn to page 27.

WAIT -- you are not through with GOALS. You now have an IMPORTANT task. Put the GOAL STATEMENTS on page 26A in order of priority. Number 1 is the most important, number 2 is the next most important, etc. If you have a long list of GOAL STATEMENTS, it may help you to arrange them in order of importance by first deciding which ones are <u>most</u> important and which are <u>least</u> important, and then ordering the rest of the statements between the two extremes. Use the blanks on page 27A.

Here are the sample GOAL STATEMENTS as they were ordered in priority:

1.0 To promote responsibility and self-direction within the faculty through participation in the administrative process.

2.0 To promote intercultural understanding and appreciation among both the faculty and the students.

3.0 To establish and maintain high standards of education as perceived by international and national accrediting agencies.

4.0 To offer the students the very best possible education by providing them with teachers who are knowledgeable about the most recent methodology and subject matter.

5.0 To offer language instruction to the extent that all students may communicate effectively in both written and oral English.

Turn to Page 27A

Refer to page 26A Most important goal.

1.

Next most important goal.

2.

Continue in this manner until all goals are listed.

Read - re-read -- Are you happy with the order of importance? Good - you are about ready to begin work on your discrepancy analysis - But, wait a minute. You may be better served if you know what we think your end product will look like. A blank sample page follows. Please turn to page 27B.

THE FIVE YEAR STAFF DEVELOPMENT PLAN
FOR
THE_____AMERICAN SCHOOL

Prioritized Goals	Related Objectives	Activities	Estimate Cost	Fund Source	Attainment Criteria	Fiscal Year of Accomplishment
1.	1.1	1.1.1			1.1.1.1	
		1.1.2			1.1.1.2	
		1.1.3			1.1.1.3	
	1.2	1.2.1			1.2.1.1	
		1.2.2			1.2.2.2	
		1.2.3			1.2.2.3	
	1.3	1.3.1			1.3.1.1	
		1.3.2			1.3.2.2	
		1.3.3			1.3.2.3	
	Etc.					

(27B)

NOTE: This page reduced in size for a look at a real work sheet, Please turn to Page 36.

Now turn to page 28.

THE DISCREPANCY ANALYSIS

As you prepare to work on the discrepancy analysis consider what you have done in the planning process. You have a mission statement and you have derived goals from the admission statement. In addition, you have accomplished the difficult task of prioritizing the goals. You know the direction you want your staff development plan to go in the next five years. Now is the time to assess where you are in relationship to where you want to go. Thus, a discrepancy analysis is necessary. You may have to gather data that will help you decide where you are. You may have to talk with staff members individually and in groups. You may have to examine educational records such as transcripts, etc. You must do everything that is necessary to make sure you can assess accurately the present "health of your staff" in relationship to your prioritized goals. After you have completed the discrepancy analysis, you should move toward your objectives.

Please turn to page 29.

WRITING OBJECTIVES

Before you start -- some facts about OBJECTIVES.

1. OBJECTIVES are derived from your Goal Statements.

2. OBJECTIVES are measurable (by observation and/or with appropriate instruments).

3. OBJECTIVES usually have time periods designated.

4. OBJECTIVES usually have quantities specified.

5. There may be several OBJECTIVES for each goal statement.

6. One OBJECTIVE may apply to more than one goal.

If you have never written objectives prior to this time, do not expect them to be easy. It will take some practice. The method we suggest to write objectives is only one of many. We believe it is the best compromise between brevity and completeness. However, you may use any method which works for you.

In order to help you get started, look at OBJECTIVE 1.1 below. The first phrase, derived from Goal 1.0, specifies who or what is involved in the whole objective. The date, February, 1980, indicates a time period and sets a deadline for accomplishment. The last sentence specifies a quantity, monthly, within an implied time period, the rest of the school year. By observation, one can measure attainment of the objective by noting first if the committees started their work in February, 1980, and continued to meet monthly thereafter. Note that as this objective is written, attainment depends only upon the condition of the committees' meeting regularly starting in February, 1980. It specifies nothing about the quality of work produced.

Finally, take note of the nomenclature used to associate the objectives with particular goals. Four objectives -- 1.1, 1.2, 1.3, 1.4 -- are all associated with Goal Statement No. 1. Similarly, three objectives are marked to signify their association with Goal Statement No. 2.

Some example OBJECTIVES:

1.1 Separate faculty administrative advisory committees will manage the lower, middle, and upper schools, beginning February, 1980. Committees will meet <u>at least</u> on a monthly basis.

1.2 The admission and placement of students will be determined by a faculty committee, beginning in February, 1980.

1.3 Curriculum standards and materials acquisition will be recommended by a faculty committee, beginning February, 1980.

1.4 By June, 1981, one-half of the faculty will have completed a three-credit course in school administration.

2.1 Each new U.S. teacher will receive 12 hours of orientation to the international school and life in the host nation.

2.2 Each new host national teacher will receive 12 hours of orientation to the international school and American education in general.

2.3 At least once every two years, every teacher will receive 10 hours of instruction in the history and culture of the host nation.

3.1 By the summer of 1980, a non-graded system will be fully operational in the elementary grades in the areas of reading, math, and social studies.

Now turn to page 30.

DERIVING ATTAINMENT CRITERION

The statements of OBJECTIVES should reflect a specific category of goals or goal in terms of a time span of five years or less. Please remember two important characteristics of the OBJECTIVES you wrote: OBJECTIVES are measurable, and usually have quantities specified. For these reasons, you should also be able to state ATTAINMENT CRITERION for each OBJECTIVE you write. Your ability to state an ATTAINMENT CRITERION for each OBJECTIVE you develop is one way to determine if you have produced a clear, usable OBJECTIVE.

An ATTAINMENT CRITERION is just an alternative way of stating how the OBJECTIVE is to be evaluated (measured). The ATTAINMENT CRITERION for OBJECTIVE 1.1 was explained on page 29.

In that instance, one needed only to see (1) if the three committees were formed by February, 1980, and (2) if the committees met on <u>at least</u> a monthly basis thereafter. The ATTAINMENT CRITERION need not always be some sort of sophisticated test or questionnaire. Often, it may be a homey thing, such as observing or counting, or the presence or the absence of an event or behavior.

Use the form on page 30B to list the OBJECTIVES associated with each of the goals. There is also space on the form to include ATTAINMENT CRITERION and the FISCAL YEAR in which the OBJECTIVE is to be reached.

Stating the FISCAL YEAR in which the OBJECTIVE is to be attained will help you to order the OBJECTIVES in importance as well as to specify the TIME it should take to reach the ATTAINMENT CRITERION identified for each OBJECTIVE.

Below is a facsmile (page 30A) of the form with Goal 1 of the example completed:

GOAL 1 Objectives 1 through 4

Priority	Description of Objective	Attainment Criteria	Fiscal Year(s)
1.1	Separate faculty administrative advisory committees will manage the lower, middle, and upper schools, beginning February, 1980. Committees will meet at least on a monthly basis.	Were committees formed by February, 1980?	1980 through 1984
1.2	The admission and placement of students will be determined by a faculty committee, beginning in February, 1980.	Was committee working by February, 1980?	1980 through 1984
1.3	Curriculum standards and materials acquisition will be recommended by a faculty committee, beginning February, 1980.	Was committee working by February, 1980?	1980 through 1984
1.4	By June, 1981, one-half of the faculty will have completed a three-credit course in school administration.	Was course offered? How many faculty took course?	1980 1981

(30A)

Following this example, use form 30B to order your OBJECTIVES according to their importance. If you do not use separate sheets for each goal, mark a heavy black line between objectives for one goal and objectives for the next goal.

Please turn to page 30B.

REMEMBER THAT GOALS MAY HAVE MORE THAN ONE OBJECTIVE.
LIST BELOW THE OBJECTIVES FOR: (Remember, you do not have to restate the Goal - the appropriate number is enough.)

Goal # _____ OBJECTIVES 1 through _____

Priority No.	Description of Objective	Attainment Criteria	Fiscal Year(s) of Accomplishment

(30B)

Check the priority ranking -- OK? -- Then move on to page 31 and deal with ACTIVITIES.

WRITING THE ACTIVITIES

Some Facts About ACTIVITIES:

ACTIVITIES are important because they consume human and material resources. The human resources represent time (money), and the material resources may or may not be consumable, but still may be costed. Thus, this column is important. Remember, the ACTIVITY is derived from the Objective. There may be more than one ACTIVITY per Objective. Some sample ACTIVITIES for Goal 1, Objectives 1, 2, and 3, are:

1.1.1 Establish three separate faculty committees to manage the lower (nursery-4th), middle (5th-8th), and upper (9th-12th) schools. Committees will meet <u>at least</u> monthly.

1.2.1 Establish a three-member faculty committee to set standards of admissions and placements, and to review appeals from parents.

1.2.2 Charge the committee to prepare a written document by the beginning of the next school year explaining the school's admissions and placement procedure for distribution to the public.

1.3.1 Establish a four-member faculty committee to recommend curriculum standards and materials acquisition in the areas of language arts, math, science, and social studies.

Now turn to page 32 and begin to list your ACTIVITIES.

ACTIVITIES

Please list all the activities that you believe are necessary to help you attain the objectives previously stated. The activities should also be in priority order and be derived from a category of objectives or objective. Please note that at this stage we will want to think of costs, etc., and we will assist you in this.

Please list:

Goal 1 (Do not restate, number is sufficient)

Objective 1.1 (Do not restate, number is sufficient)

Write the Activity

Activity 1.1.1

_____

_____

Objective 1.2

Activity 1.2.1

_____

_____

Activity 1.2.2

_____

_____

Objective 1.3

Activity 1.3.1

_____

_____

Please list:

Goal 2

Objective 2.1

Activity 2.1.1

_____

_____

OK -- Moving along, let's try COSTING. Move to page 33.

COSTING THE ACTIVITY

Here we go -- Provide your best estimate of costs per line item whenever possible. Use forms 33A and 33B to help you. However, since you are planning for the future you may have to estimate. Don't hesitate to estimate -- use a good ball park figure. Also, some activities costs will have to be estimated by others, so simply say "others".

In order to help you, we have prepared two forms, 33A and B. The forms on pages 33A and B will help you remember all the human and material resources necessary to complete the activity you are costing.

At this point, we are interested in the accounting term "direct costs," such as:

a. Salaries, wages, benefits

b. Supplies and services (include travel -- per diem, etc.)

c. Equipment that is purchased out of operating funds.

Please note that our interest is in operating costs. Capital costs require a different approach.

In some cases, costs will be little or nothing. For example, costs for the activity derived from the example objectives (page 30A) will be almost zero for the first three activities, (page 31) since only some paper supplies and provision for staff time are needed. The fourth activity will require some expense, since it will be a University-sponsored activity. However, this is also a case in which you might <u>not</u> be able to estimate the cost and it would be appropriate for you to write "others" in the space designated for the money figure of the activity. Your note of "other" will cue the project analyst to look for the details of this particular activity from some other source.

Human resources are the most expensive, so let's start with 33A.

STAFFING REQUIREMENTS

Goal 1

Objective 1.1 Not necessary to restate, number is sufficient

Activity 1.1.1

Total Number of Positions by Fiscal Year

POSITION	1979-80 No. FTE	1980-81 No. FTE	1981-82 No. FTE	1982-83 No. FTE	1983-84 No. FTE	No. of FTE for _____yr. times (X) Average Salary for FTE or Other
Full-time Faculty						
Part-time Faculty						
Professional Administrative Staff						
Full-time Support Staff						
- Clerical						
- Non-Clerical						
Other Staff (Please specify title)						
- Part-time clerical						
- Paraprofes-sional						
-						
-						
-						
-						
Total $ Instruc-tional Staff Per Year for five years						

NOTE: Full-time Equivalent (represents your definition of instructional load).

PLEASE ALSO NOTE THE EXTRA FORMS FOR YOUR USE.

Now try 33B.

(33A)

MATERIAL COSTS

Goal 1

Objective 1.1 (No need to restate, number is sufficient)

Activity 1.1.1

Presently Available	1979-1980			1980-1981			1981-1982			1982-1983			1983-1984			
	No.	Unit Cost	Tot. Cost	No.	Unit Cost	Tot. Cost	No.	Unit Cost	Tot. Cost	No.	Unit Cost	Tot. Cost	No.	Unit Cost	Tot. Cost	Total Material Cost for Planning Period

(33B)

Total Cost by Year

Now to summarize -- Please turn to page 33C.

You should be able to obtain from pages 33A and 33B dollar estimates that, when summed, represent an accurate estimate of the cost of the objective.

Now please turn to page 34.

If you have completed each of the previous steps for each goal, objective and activity, you should be able to extract from forms,

27A

30B

32

33A and B

33C

sufficient data to complete a page that looks like this: (see page 36).

Please use column designation on page 35 to complete your blank form which is similar to page 36. Please note that we have included blank work forms for your convenience.

Column 1 - Please extract GOAL 1 from page 27A (your first priority goal) and place it in Column #1, page 33A.

Column 2 - Please extract OBJECTIVE 1.1 derived from GOAL 1 (page 30B) and place it in Column #2, page 33A.

Column 3 - Please extract your first ACTIVITY derived from OBJECTIVE 1.1 (page 32) and place it in Column #3, page 33A.

Column 4 - Please extract the COST you have estimated for this ACTIVITY (sum the total of 33A and B for this Activity), and place it in Column #4, page 33A.

Column 5 - Indicate the source of funds i.e. general fund, foundation, etc. and place it in Column #5, page 33A.

Column 6 - Please extract the ATTAINMENT CRITERIA listed for OBJECTIVE 1.1 (page 30B) which apply, and place it in Column #6, page 33A.

Column 7 - Indicate the academic year when goal will be met and place it in Column #7, page 33A.

If there are additional Objectives for Goal 1, repeat columns 2 through 7 using appropriate numerals and priorities.

If there are additional Activities for Objective 1.1, repeat columns 3, 4, and 5 using appropriate numerals.

Now turn the page to 33A.

THE FIVE YEAR STAFF DEVELOPMENT PLAN
FOR

THE_____AMERICAN SCHOOL

PRIORITIZED GOALS	RELATED OBJECTIVES		ACTIVITIES	ESTIMATED COST	FUND SOURCE*	ATTAINMENT CRITERIA		FISCAL YEAR OF ACCOMPLISHMENT
1. To promote responsibility and self direction within the faculty through participation in the administrative process	1.1 Separate faculty administration advisory committees will manage the lower, middle, and upper schools, beginning February, 1980. Committees will meet at least monthly	1.1.1	Establish three separate faculty committees (N-4th 5th-8th & 9-12)	NONE	NONE	1.1.1.1	Were committees established by February, 1980?	1979-1980
		1.1.2	Develop meeting calendar	NONE	NONE	1.1.1.2	Did committees meet at least monthly?	1979-80

(36)

*FUND SOURCE MEANS (A) GENERAL FUND
(B) OTHER FUNDS
(BE SPECIFIC i.e. GRANT FUNDS)

AND NOW TURN THE PAGE. . . . .

THE FIVE YEAR STAFF DEVELOPMENT PLAN
FOR

THE_____AMERICAN SCHOOL

PRIORITIZED GOALS	RELATED OBJECTIVES	ACTIVITIES	ESTIMATED COST	FUND SOURCE*	ATTAINMENT CRITERIA	FISCAL YEAR OF ACCOMPLISHMENT
1.	1.1	1.1.1			1.1.1.1	
		1.1.2			1.1.1.2	

(36A)

*Fund source means (A) General fund
(B) Other funds
(Be specific i.e. Grant Funds, etc.)

FINAL DOCUMENT

After you have completed the assembly (don't be afraid to use scissors and paste) of information for each goal, objective, activity with cost estimates and fund source, you can assemble your document. Remember -- it needs:

A. Title Page

B. Mission Statement

C. Goals

Objectives

Cost Estimates

Funding Sources

Attainment Criteria

and it will probably look like the material appearing on page 36.

You now have a working draft of a multi-year staff development plan. You should:

1. Elicit comments from staff.
2. Ask for Board approval.
3. Submit your plan to the Office of Overseas Schools Regional Director, and to any other funding source.

GOOD LUCK!